U.S. DEPARTMENT OF LABOR

TRAVEL MANAGER

HOW TO ADD NEW USERS INTO TRAVEL MANAGER

(VERSION 7.1C)

U.S. DEPARTMENT OF LABOR OFFICE OF THE CHIEF FINANCIAL OFFICER OCTOBER 2000

How to Add a New User to the Travel Manager Data Base

The following instructions assume that infrastructure information for your organization has been entered into Travel Manager. That means:

- The Numbering/Naming Sequences have been added to the data base.
- Organizations linked to Numbering/Naming Sequences have been entered.
- At least one Accounting Code (and more when needed) have been entered for each organization (cost center).
- C Groups have been established for each Organization, where necessary.

Entering a Traveler for the First Time

To begin the process you must have or know at least the following information for each person you expect to enter into the Travel Manager data base:

- C Name.
- Social Security Number. (Travel Manager indexes all personal information to the user's Social Security Number. A Social Security number must be entered for each traveler and travel document preparer. A travel document preparer is a person assigned responsibility to prepare travel documents for other travelers.)
- C Permanent Duty Station City and State location.
- C Resident City and State location.
- C Time zone in which the traveler resides.
- Name of the organization to which the traveler or preparer belongs.
- C The E-mail address of the traveler or travel document preparer.
- C Does the traveler have a Government- sponsored charge card?
- C The Accounting Code most frequently used by the traveler to record travel expenses in DOLAR\$.
- Who will sign the traveler's authorizations and vouchers.
- If the new user is a "preparer" of travel documents for another person(s), who is that person(s) or what cost center does the "preparer" need access to.

It is also helpful to know the traveler's home address and/or EFT routing as well as document routing information, but this data can be added later.

Once you have the above information you are ready to begin to enter data for a traveler or preparer of travel documents.

New user information can be entered into the system from either the Document Preparation Module (**Authorization - Untitled** Screen) or from the Document Preparation Administration Module (Travel Manager **Doc Prep Admin** Screen). If you have more than a few users to add to the data base, entering users from the Document Preparation Module is recommended. New user information is entered only once and is stored in the database for future use.

From the Doc Prep Module (new Authorization Screen)

Sign on to Travel Manager and select **File**, **New**, **Authorization**. To add a traveler to the database, perform the following steps:

1. From the **Authorization - Untitled** screen, enter a *Social Security number* in the SSN box at the top of the screen and press **TAB**. If the Social Security Number is not in the database, a prompt will appear and ask if you want to add a person with this Social Security number. After clicking on **Yes**, the **Add Traveler** window displays. Complete all the appropriate information.

OR

From the Doc Prep Admin Module (Travel Manager Doc Prep Admin Screen)

Sign on to Travel Manager, select **Modules, Doc Prep Admin, Button with a single "red" figure, Add**. The **Add Traveler** screen displays. Complete all the appropriate information.

- 2. In the **Add Traveler** window, enter the information requested:
 - A. In the **Last** field, enter the *last name* and press **TAB**.
 - B. In the **First** field, enter the *first name* and press **TAB**.
 - C. In the **MI** field, leave blank or enter the *middle initial* and press **TAB**.
 - D. In the **Gender** field, select **Male or Female**.
 - E. In the **Address** block:
 - 1) In the **Mailing** address, enter "EFT".

Note: You may wish to use the second line of the address to specify EFT routing information.

- 2) Enter the **Residence City** and **State**.
- F. Press **TAB** to move through the fields until you reach **Present Station**.
 - 1) Enter the permanent duty station, e.g., *Washington*, *DC* or the appropriate *Permanent Duty Station*.
 - 2) To move to the **Organization** field or any sequential field, press **TAB**.
 - 3) In the **Organization** field use the drop down menu to select the *organization* to which the traveler is a member. The organization is listed in the form of a six character phrase. The first character represents the location of the Servicing Finance Office. For example, "N" represents OASAM's Business Operation Center in the National Office, "1 through 10" respectively represent the Regional Servicing Finance Offices, and "M" represents MSHA/Denver Servicing Finance Office. The second character is dash ("-") that is used to separate the Servicing Finance Office symbol from the next four characters. The last four characters represent the travelers "cost center" as used in DOLAR\$ (ORG RCC). The first of the four characters represents the Agency within DOL. For example, "F" represents OSHA. The last three characters are numerical and represent a unique cost center within an Agency.

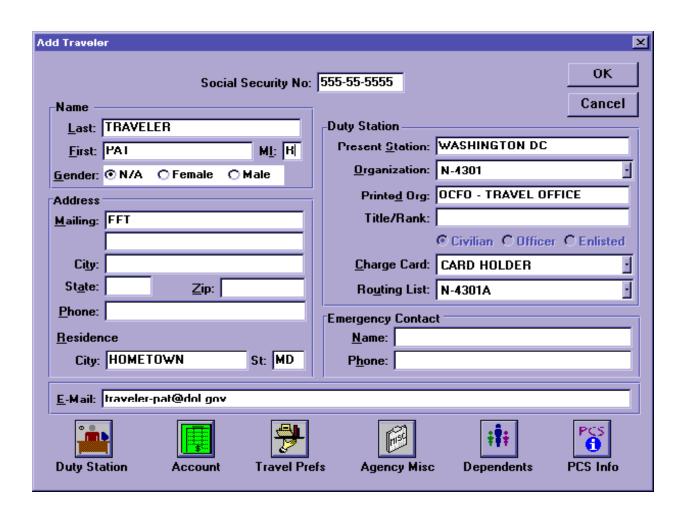
Note: If you are not sure which **Organizational** code to use, consult with your Travel Manager Administrator. The use of the correct code is **critical** to other processing steps within Travel Manager.

- 4) In the **Printed Org** field, enter a descriptive title. For example, a traveler who works in the Office of Financial Systems within the Office of the Chief Financial Officer would enter *OCFO/OFS*.
- 5) Completion of the **Title/Rank** field is optional.
- 6) In the **Charge Card** field, select **CARD HOLDER** from the drop-down list if the traveler has been provided a Government Contractor issued Charge Card. Select **INFREQUENT TRAVELER** if the traveler travels infrequently and has not been provided a Charge Card. Choose **DECLINEE** if the traveler has had their Charge Card revoked. The selections are used to determine the rules to apply when Travel Manager calculates the amount of a cash advance if and when the traveler requests a travel advance from DOL.

7) In the **Routing List** field use the drop down menu to select the **Routing List** for the organization. In some Agencies the **Routing List** code looks identical to the **Organization** code. This step need not be performed if your Agency has not elected to use Electronic Processing at this time.

Note: If you are not sure which **Routing List** code to use, consult with your Travel Manager Administrator. The use of the correct code is <u>critical</u> to other processing steps within Travel Manager.

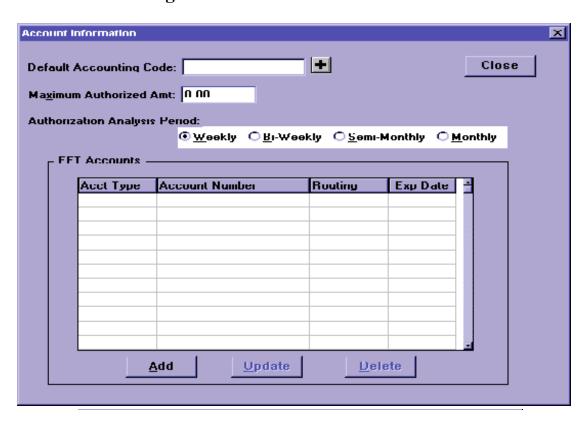
- 8) Leave the **Emergency Contact** fields blank or enter information of choice.
- 9) In the **E-mail** field, enter the traveler's *E-mail address* (users on the OASAM LAN would enter in small letters the *last name* followed by the *first name*. Separate the last and first name by a "-". Follow the first name by "@dol.gov").



- 3. Select the **Duty Station** button to enter additional duty station information:
 - A. In the **Agency** block at the top of the page enter "your Agency".
 - B. In the Unit block at the top of the page enter "your organization".
 - C. In the **Time Zone** block enter appropriate *time zone* in which the traveler is located.

Note: Address and Clearance data is not required.

- D. In the **Authorizing Officials** block, enter the following:
 - 1) In the **Voucher Name** field, enter the *name* of the person who will approve the traveler's vouchers. In the **Voucher Title** field, enter his/her *title* (you may need to abbreviate).
 - 2) In the **Authorization Name** field, enter the *name* of the person who will authorize the travel. In the **Authorization Title** field, enter his/her *title* (you may need to abbreviate).
 - 3) To return to the **Add Traveler** window, select **OK**.
- 4. Select the **Account** button to choose a default accounting code.
- A. On the **Account Information** screen, select the lookup button "+" in the **Default Accounting Code** field.



B. On the **Select Default Account for Traveler** screen, highlight a *default accounting code* and choose **Select**.

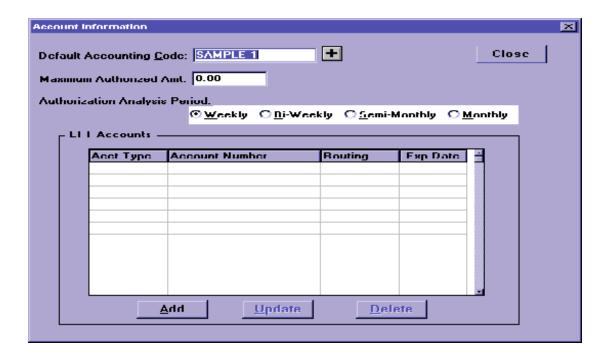
Note: The Travel Manager Administrator for your organization may have associated one or more accounting codes with the organization of the person for whom you are entering Travel information. Click on Account button at the bottom of the screen. Click on the "+" sign to the right of the Default Accounting Code to view one or more alternative accounting codes. Highlight the accounting code that is most likely to be used by the traveler and choose Select. If the accounting code you wish to select is not listed, ask the Travel Manager Administrator to show you how a new accounting code may be added. If you are not sure which Default Accounting Code to use consult with your Travel Manager Administrator. The use of the correct code is critical to other processing steps within Travel Manager.

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l- 4 301	SAMPLE 1	01-4301-FUND-2110-71000-000	
-4301	SAMPLE 2	U1-43U1-QDB8-211U-/1UUU-UUU	- 8
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C. On the **Account Information** screen, select **Close**

Note: All other fields should be left blank on the **Account Information** screen. Bank and/or government charge card account information is not entered. This information is only used when there is a third party processing payments for an Agency. DOL processes its own payments.

D. To return to the **Add Traveler** window, select **Close**.



E. Review the **Add Traveler** window to make sure all the data is correct.

Note: There is no need to enter Travel Prefs, Agency Misc, Dependants, or PCS Info at this time.

E. To close the **Add Traveler** window, select **OK**.

Note: If you are entering a new user form the Document Preparation Module and the system asks "Create a permanent record for this traveler?", select **Yes**.

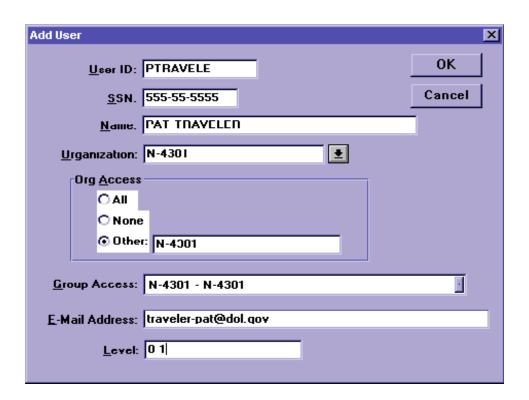
- 5. Since DOL has enabled **Logins** and **Routing** in Travel Manager, you will need to answer two additional prompts to add the name to the **User** and **Signature** tables.
 - A. At the prompt, "Add *name* to the User List?", select **Yes**.
 - 1) In the **Add User** window and in the **Organization Access** field, if the new user's organization does not appear, check the **Other** box and add the traveler's *organization*. The traveler's *organization* code should be the same as appears in the **Organization** box above. By giving the traveler access to his/her own organization s/he will be able to update his/her own travel information on the **Travel Information** window.
 - 2) The **Group Access** field is left blank for travelers but must be completed for each document preparer.

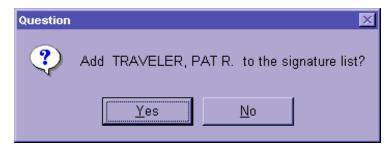
Note: If the person for whom you are entering Traveler Information will be asked to prepare travel documents for other travelers within their organization, give this person access to a Group. For some DOL Agencies the normal naming convention for groups is the same as that for an organization. If you do not know how to select your group name, ask the Travel Manager administrator. All of the travelers for whom that person will prepare travel documents must be included in the Group (see **Step 7** below). If the person for whom you are entering Traveler Information is a traveler and will not need to access traveler documents of fellow travelers, leave the Group field blank. Travel document authorizers and approvers (Manager) are given access to travel documents via another feature in Travel Manager and don't need access to a Group.

3) In the **Level** field enter "**0**" for a traveler or "**0-1**" if the person is a preparer or authorizer/approver of authorizations/vouchers for other

travelers.

4) In the **Add User** window, select **OK** to accept the user information.





B. At the prompt, "Add name to the signature list?", select Yes.

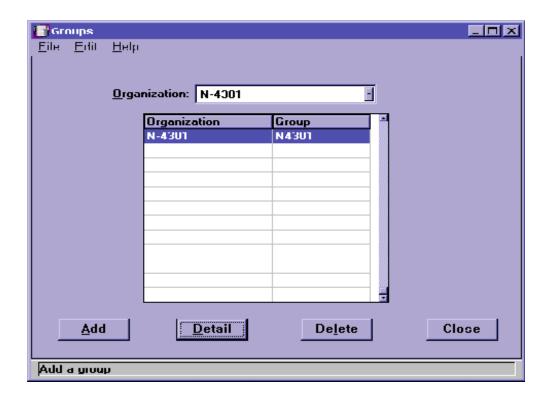
Signature Information	×
N DAT TRAVELER	
Name: PAT TRAVELER	
Effective Date: 01/10/00	
OK Cancel	

C. In the **Signature Information** window, select \mathbf{OK} to accept the signature information.

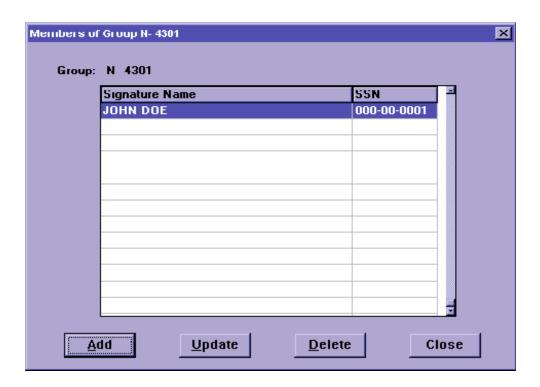
- 6. If when you began the process of entering new traveler information you began from the **Authorization Untitled** screen you will be asked, "*Create a permanent record for this traveler? If NO, this traveler will exist only for this document.*" Select **Yes**.
- 7. If the person you are adding to Travel Manager is a traveler and another person will be asked to prepare travel documents for the traveler, you will need to enter the traveler into a Group. Groups have been established for each organization and a "preparer" is given access to the documents of the travelers registered to each group.
 - A. From the Travel Manager **Doc Prep** screen select **Modules, Doc Prep Admin.**
 - B. From the **Doc Prep Admin** screen, select the **Setup** menu.
 - C. Select **Security** and click on **Groups**.

Note: Alternatively, select the button at the top left of the **Doc Prep Admin** screen on which three figures are displayed.

D. On the **Groups** screen, in the **Organization** box at the top of the screen use the drop down menu to find and select the *organization* to which the traveler belongs.



E. Select **Detail** and the system will display the **Members of the Group** *name* screen.

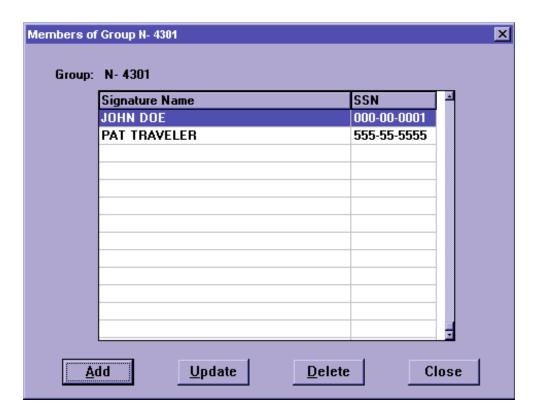


F. To add a traveler to the group, click on **Add**. On the **Add Members of the Group** *name* screen, type the name of the traveler you wish to add to the group into the **Name** box .



Note: Alternatively click on the "+" next to the **Name** field to display the list of travelers. The **Select a Traveler** screen will appear. Highlight the traveler's "name" and click on **Select**. The system will display the **Add Members of the Group name** screen. Click on **OK**.

G. On the **Add Members of the Group** *name* screen, select **OK**. The system will display the **Add Members of the Group name** screen.



- H. Repeat steps above to add more users to the group.
- I. Click on **Close** to exit the **Members of Group** *name* table.
- J. Click on **Close** to exit the **Group** screen.

Note: All of the travelers for whom a "preparer" will prepare travel documents must be included in the same Group. For some DOL Agencies the normal naming convention for groups is the same as that for an organization. If you do not know how to select your group name, ask your Travel Manager administrator.

K. The task of Adding a New User is completed. The above process is repeated for each new user. If this is the last user, select **Close**.